



Electronic Access Conference
*e***magine**
2001

Student Financial Assistance

THE U.S. Department of
EDUCATION



Session 59

Become an Import-Export Magnate with EDExpress

Introduction

- Who is this session for?
 - Beginners
 - Evaluations
 - Questions
- Time for Q & A at end**

Session Purpose

- Become familiar quickly with basic EDEExpress operations
- You'll be importing, exporting and handling ISIR's like a pro in no time!





Learning Objectives

In this course, you will learn about:

- Logging into EDEExpress
- Basic setup
- Importing ISIR's
- How ISIR's appear in EDEExpress
- Correcting student ISIR's

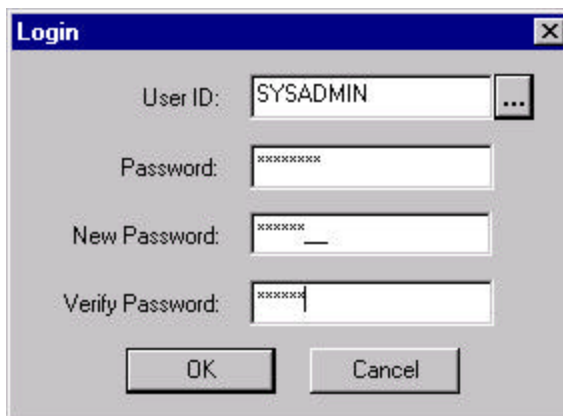


Learning Objectives (cont.)

- Creating new applications
- Exporting
- Keeping track of your import-export business using the Batch Activity Grid
- Printing
- Common errors and tips

Logging into EDEExpress

- If you are logging in for the first time, the user id and password are SYSADMIN; otherwise, use your own User ID and password



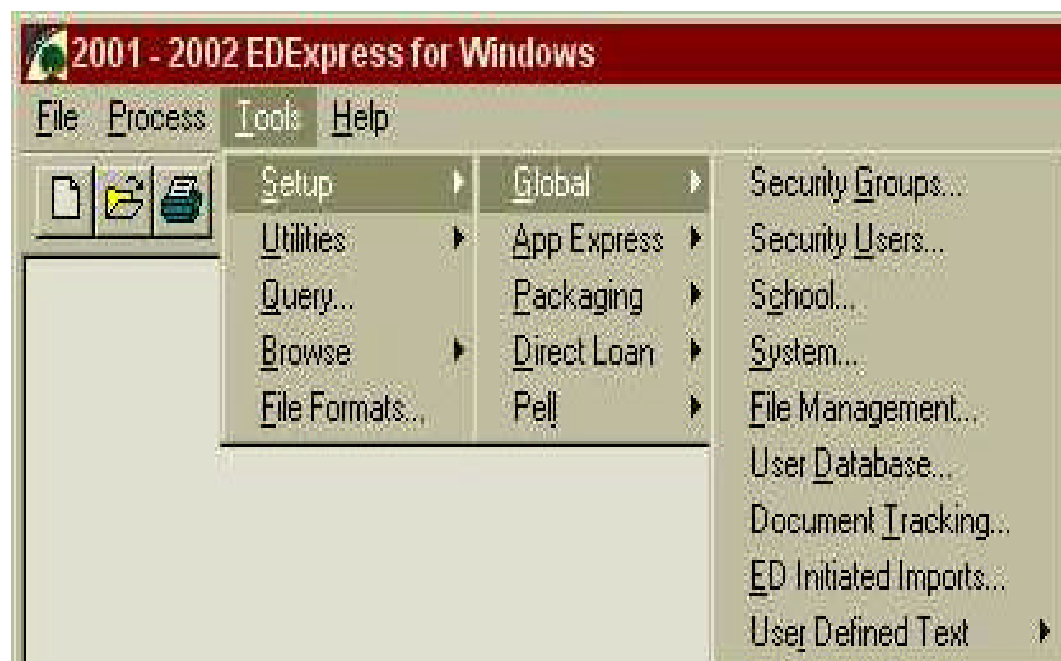
A screenshot of a Windows-style login dialog box titled "Login". It contains four input fields: "User ID:" with the text "SYSADMIN" and a dropdown arrow; "Password:" with masked characters "xxxxxxx"; "New Password:" with masked characters "xxxxxx"; and "Verify Password:" with masked characters "xxxxxx". At the bottom are "OK" and "Cancel" buttons.



Basic Setup


EDExpress Setup

- Most setup features are found on the **TOOLS** menu under **SETUP**, then **GLOBAL**




EDExpress Setup - User ID's

From
TOOLS,
SETUP,
GLOBAL,
select
SECURITY
USERS to
reach this
screen:



The 'User Security' dialog box is shown with the following fields and controls:

- User ID:
- Group Name:
- Logged in?: ☒
- Export to EDconn32?: ☒
- Password:
- Password Date: 
- Navigation: 1 of 1, , , ,
- Buttons: , ,

EDExpress Setup - School

Use “RETRIEVE”
button to find your
school

Check “ASSUMED
SCHOOL”



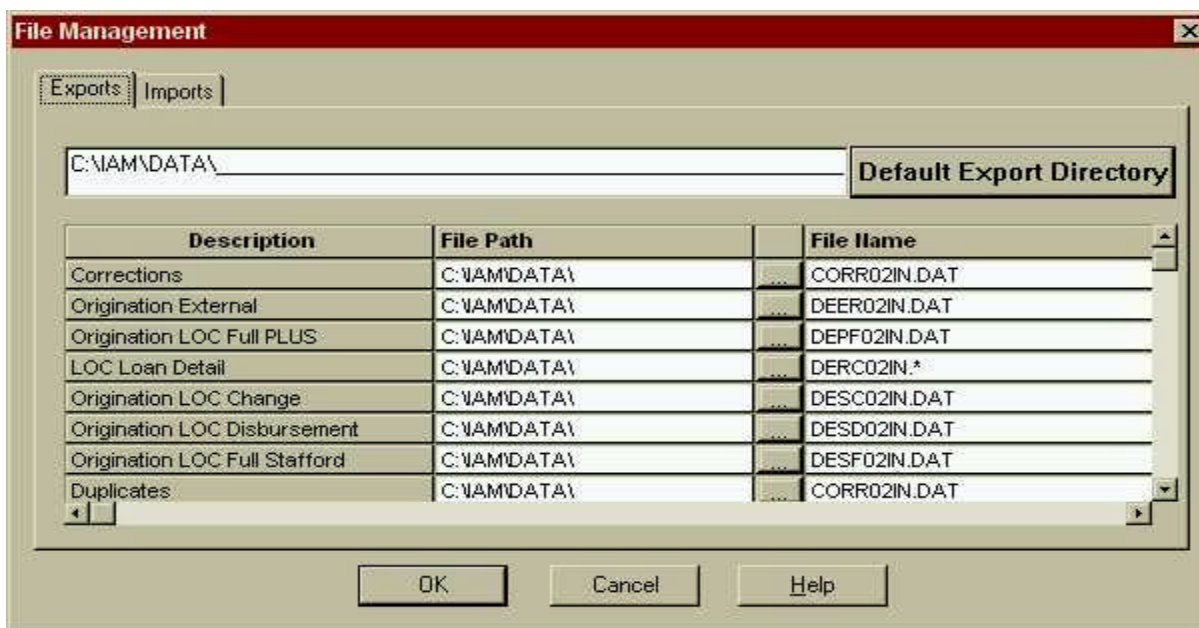
The screenshot shows the 'School' setup window in EDExpress. The window has a red title bar with the text 'School' and a close button. The main area contains several input fields and checkboxes. The 'School Code' field is set to '001224'. The 'Name' field is set to 'LOS ANGELES HARBOR COLLEGE'. The 'Address' field is set to '1111 FIGUEROA PLACE'. The 'City' field is set to 'WILMINGTON'. The 'State' field is a dropdown menu set to 'CA'. The 'Zip Code' field is set to '90744'. There are three checkboxes: 'Assumed School' (checked), 'App Processing Participant' (checked), and 'Direct Loan Participant' (unchecked). At the bottom, there is a navigation bar with buttons for 'Add', 'Delete', 'Save', and 'Retrieve...'. Above these buttons is a status bar showing '167 of 9328'. Below the navigation bar are three buttons: 'OK', 'Cancel', and 'Help'.

School	School Code:	001224
Name:	LOS ANGELES HARBOR COLLEGE	
Address:	1111 FIGUEROA PLACE	
City:	WILMINGTON	
State:	CA	Zip Code: 90744
Assumed School:	<input checked="" type="checkbox"/>	
App Processing Participant:	<input checked="" type="checkbox"/>	
Direct Loan Participant:	<input type="checkbox"/>	

Navigation: 167 of 9328
Buttons: Add, Delete, Save, Retrieve...
Bottom Buttons: OK, Cancel, Help

EDExpress Setup - File Management

Controls where your exported files go and where your imports come from



The File Management dialog box has a title bar with a close button. It contains two tabs: 'Exports' (selected) and 'Imports'. Below the tabs is a text field containing 'C:\VAM\DATA\' and a button labeled 'Default Export Directory'. Below this is a table with three columns: 'Description', 'File Path', and 'File Name'. The table lists various data export types and their corresponding file names. At the bottom are three buttons: 'OK', 'Cancel', and 'Help'.

Description	File Path	File Name
Corrections	C:\VAM\DATA\	CORR02IN.DAT
Origination External	C:\VAM\DATA\	DEER02IN.DAT
Origination LOC Full PLUS	C:\VAM\DATA\	DEPF02IN.DAT
LOC Loan Detail	C:\VAM\DATA\	DERC02IN.*
Origination LOC Change	C:\VAM\DATA\	DESC02IN.DAT
Origination LOC Disbursement	C:\VAM\DATA\	DESD02IN.DAT
Origination LOC Full Stafford	C:\VAM\DATA\	DESF02IN.DAT
Duplicates	C:\VAM\DATA\	CORR02IN.DAT



Importing ISIR's

Becoming an Import Magnate

Choose the IMPORT
icon on the Toolbar

OR

click on the FILE
menu, then select
IMPORT





Becoming an Import Magnate (cont.)

■ Message Classes

- SARA02OP**: Automatic ISIR's
- CORR02OP**: Electronic Corrections and Duplicates
- EAPS02OP**: Electronic Application ISIR's
- REAP02OP**: Electronic Renewal Applications
- SYSG02OP**: System Generated

Importing

Now it's your turn!
Hands-on Exercise 1



Becoming an Import Magnate (cont.)



- Do files disappear after they've been imported?
- What happens if I try to import the same file more than once?



Inside EDExpress

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Session 59-18



How ISIR's appear in EDExpress

- What is an ISIR?
 - Institutional Student Information Record
- May be viewed from the SAR\ISIR tab
- ISIR pages 1 - 2 - 3
- Status Code indicator
- Transaction number indicator
- Forward - Back (cassette style) buttons



How to create a NEW application

- Step one: Click on the FILE menu, then select NEW
- Step two: Enter/Save info on DEMO tab
- Step three: Enter the remaining data on the FAFSA tab
- Step four: Export
- Step five: Transmit



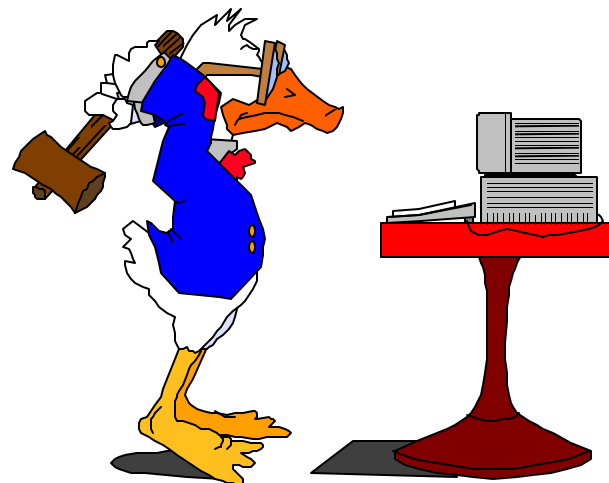
How to create a NEW Application - Tips

- Make sure to use your school code in the first position
- Verify that you are on the FAFSA tab and not the SAR\ISIR tab

Correcting Student ISIR's

■ Correction Process

- *Two options for making corrections:
 - SAR/ISIR tab
 - "Quick Correction"
- *Export
- *Transmit





Correcting Student ISIR's (cont.)

- SAR\ISIR tab
 - File\Open
 - Enter student's SSN and go to the SAR\ISIR tab
 - Make corrections, save record and export



Correcting Student ISIR's (cont.)

■ 067-33-3168 Wa

1. Find the Status code for the student
2. Make a correction to the U.S. income tax paid to \$1900



Correcting Student ISIR's (cont.)

- Quick Correction
 - Choose Process\Quick Corrections
 - Enter the student's identifiers and transaction number
 - Make corrections, save and export



Correcting Student ISIR's (cont.)

■ 555-55-5555 Ed 01

1. Add your School in Federal School code 1
2. Use 1234 for the DRN
3. Save corrections

Correcting Student ISIR's

Now it's your turn!
Hands-on Exercise 2

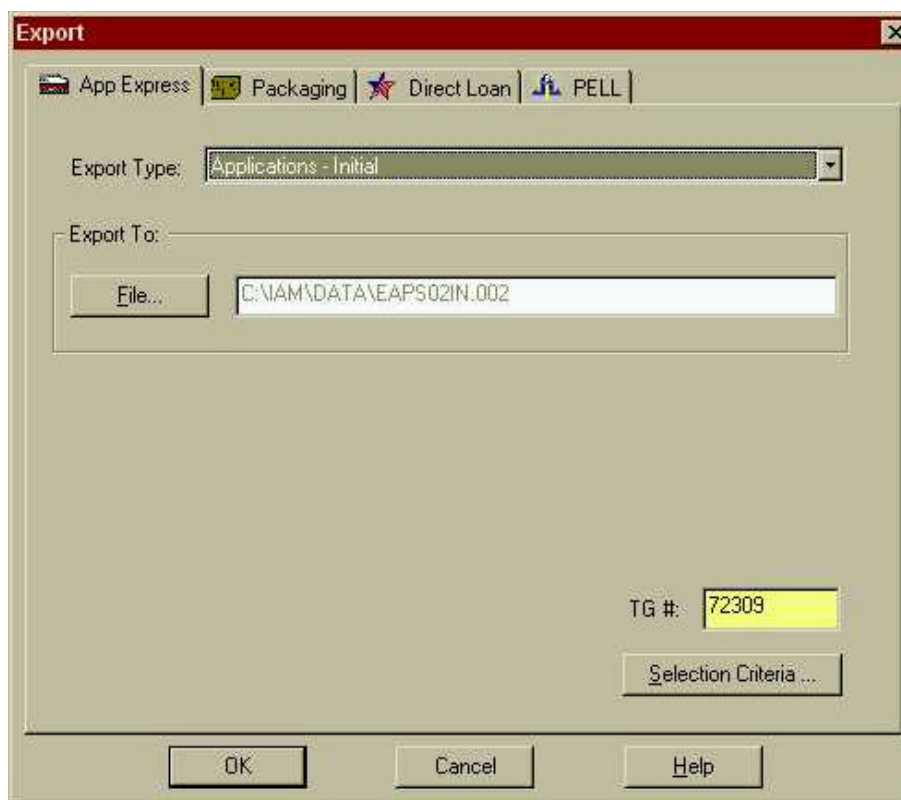




Exporting ISIR's

Becoming an Export Magnate

- Close the student's record
- File | Export
- Export Dialogue Box (at right):



Becoming an Export Magnate (cont.)

- In Progress dialogue box:





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Exporting

Now it's your turn!
Hands-on Exercise 3





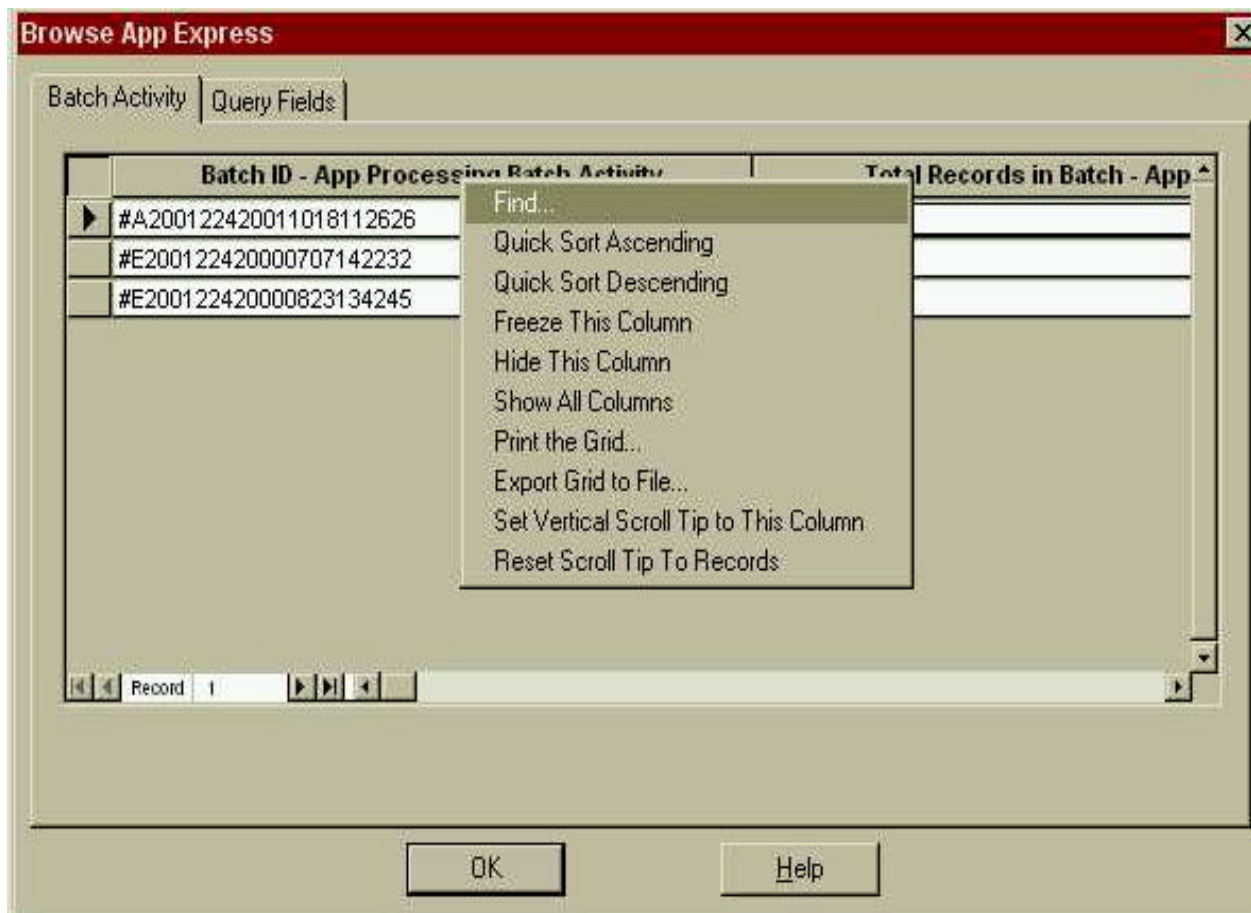
Batch Activity Grid

Track your import-export business using the Batch Activity Grid



Batch Activity Grid

Right-click on
any column
name header
(such as
“Batch ID-App
Processing
Batch Activity”)
to get the
control menu

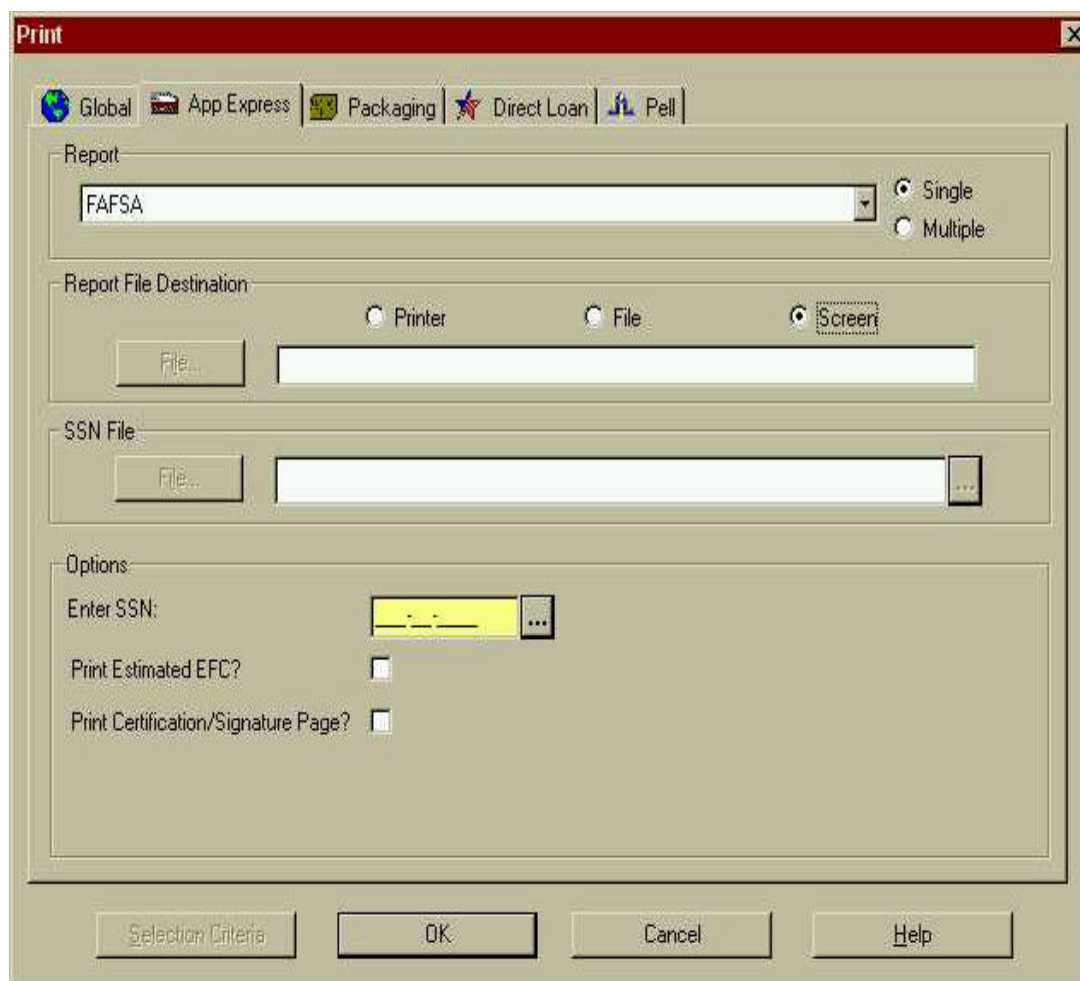


Printing

- EDEExpress can generate a number of reports:
 - FAFSA's
 - ISIR's
 - Lists of processed ISIR's
 - much more

Printing (cont.)

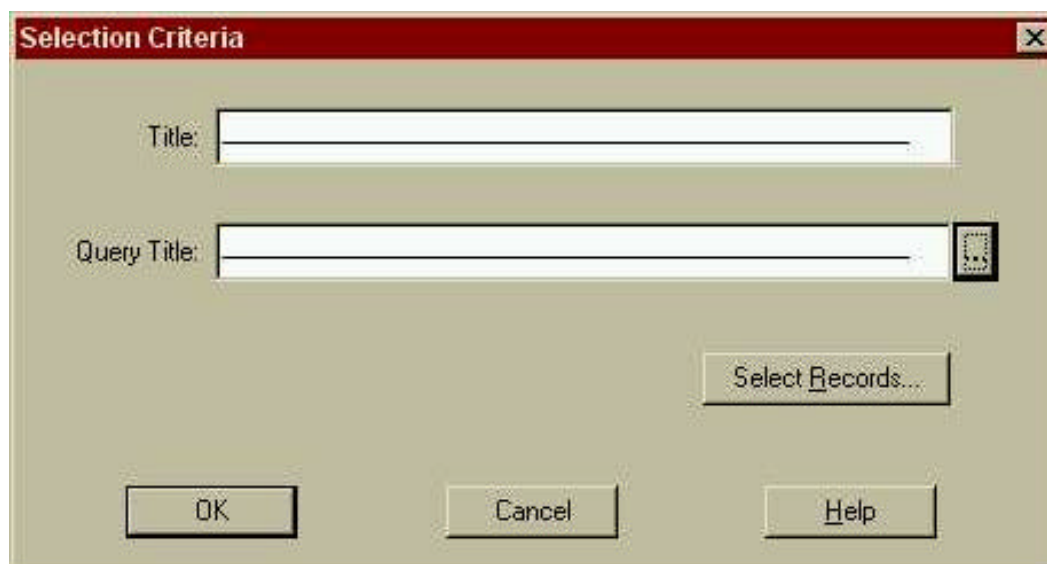
- App Express tab
- Report
- Single / Multiple
- Report File
- Destination
- Options
- Selection Criteria



The image shows a 'Print' dialog box with a red title bar. It contains several sections: a tabbed interface with 'App Express' selected; a 'Report' section with a dropdown menu set to 'FAFSA' and radio buttons for 'Single' and 'Multiple'; a 'Report File Destination' section with radio buttons for 'Printer', 'File', and 'Screen' (selected), and a 'File...' button; an 'SSN File' section with a 'File...' button; and an 'Options' section with a text field for 'Enter SSN:', and checkboxes for 'Print Estimated EFC?' and 'Print Certification/Signature Page?'. At the bottom are buttons for 'Selection Criteria', 'OK', 'Cancel', and 'Help'.

Printing Selection Criteria

- Query Title ellipsis
- Select Records



The screenshot shows a Windows-style dialog box titled "Selection Criteria". It contains two text input fields: "Title:" and "Query Title:". The "Query Title:" field has a small icon to its right, indicating a file selection or ellipsis function. Below the input fields is a button labeled "Select Records...". At the bottom of the dialog are three buttons: "OK", "Cancel", and "Help".

Printing

Now it's your turn!
Hands-on Exercise 4





Common Problems and Tips



Your student has a SAR, but you don't have the ISIR

- Check TRANKEY
- Verify your school code is listed
- Verify correct processing year on SAR

***** If all the above are correct *****

- Duplicate ISIR request
- Call CPS\WAN Technical Support



OMB No. 1545-0048
Form Approved
Exp. 12/31/2003

- ✎ If you find a mistake, or an answer has changed, put the correct answer in the boxes or completely fill in an oval (example: ●).
- ✎ Look for arrows (→ or ↙) in the area next to your information. For these items, you must give us a new answer, or if your current answer is correct, re-write the same information exactly.
- ✎ If you want to delete an answer, draw a line through your answer and through the empty boxes or ovals.

630-12-1201 ED-01 DRN: 4811

1. Last Name
EDIT

2. First Name
PLUMS

3. Middle Initial
H

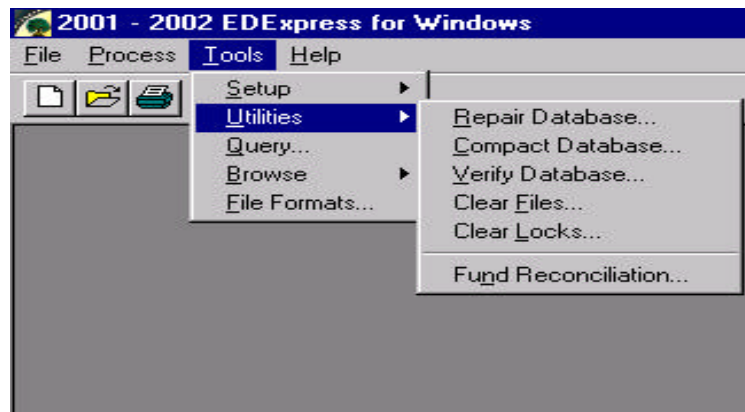
4. Permanent Street Address

Forget Your Password?

- Login under the SYSADMIN user id, if you know the password
- Reset the SYSADMIN user id password by using the reset password utility
 - found in the EDEExpress for windows
 - 2001-2002 folder (*RepairCompactResetPW.exe*)
- Go to Tools/Setup/Global/Security Users

Database Maintenance

- Repair\Compact\Verify
 - Go to Tools\Utilities
 - Should be done frequently



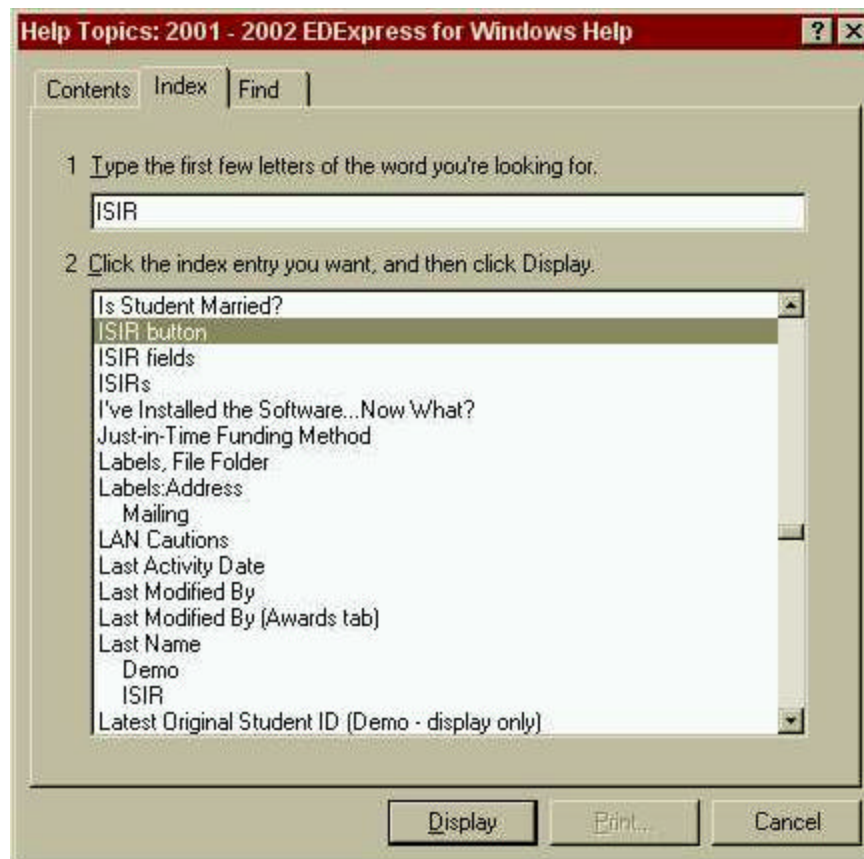
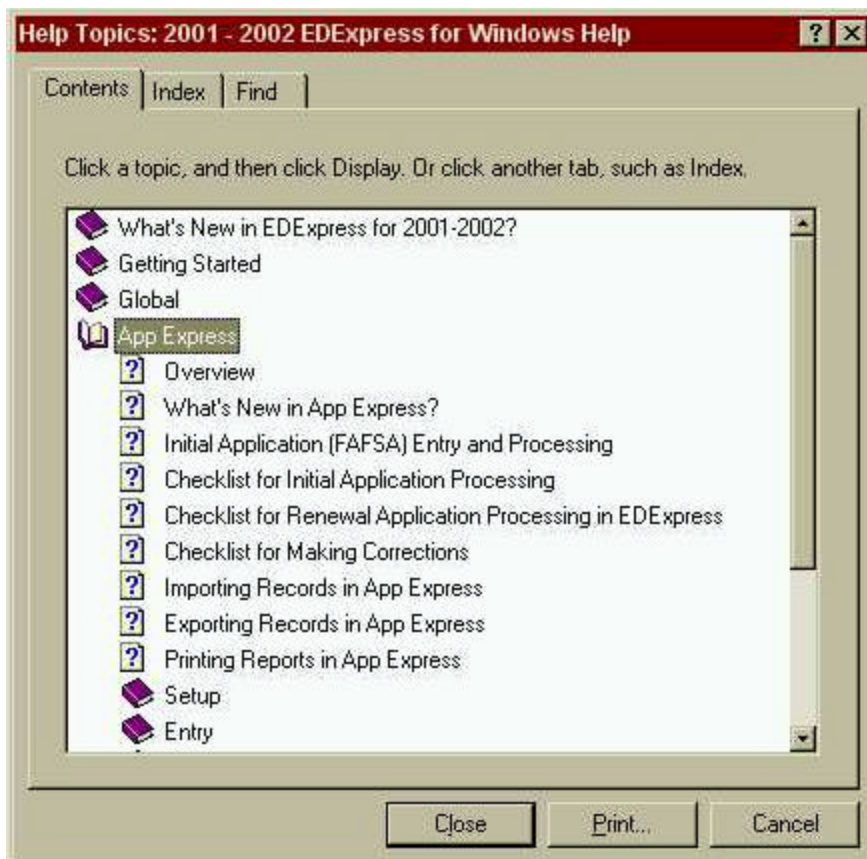
- Backup your DATABASE!!!!

EDExpress Help

- When you can't remember, try the HELP menu.



EDExpress Help (cont.)





If the Help menu doesn't help...

Contact us with your feedback or for
technical assistance:

Phone: 800-330-5947

Fax: 319-358-4260 or 785-838-2175

Email: cpswan@ncs.com



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